

The Watertown Retirement System

Request for Proposals

Active Core Oriented U.S. Mid Cap Equity Investment Manager Services

Notice to Prospective Respondents:

The Watertown (MA) Retirement Board is seeking proposals from qualified investment managers to provide active core oriented U.S. Mid Cap Equity investment management services for the Retirement System's \$183 million investment portfolio. The Retirement Board expects to allocate up to \$10 Million in total to the mandate.

All investments made by the Watertown Retirement Board are subject to the provisions of the Massachusetts General Laws, Chapter 32, as amended by Chapter 176 of the Acts of 2011, and the rules and regulations of the Public Employees Retirement Administration Commission (PERAC), 840 CMR. The selected investment manager(s) must have familiarity and agree to comply with all applicable laws and PERAC regulations.

The Board reserves the right to cancel or reject in whole or part any or all proposals in the best interest of the Retirement System.

Access to the RFP is available on InHub's online investment RFP management platform. To request access, please visit <https://open.theinhub.com/fia/watertown-us-midcap-equity>.

Proposal deadline is Monday February 12, 2018 at 4:00 PM EDT. Late proposals will not be accepted.

Please carefully review the terms and conditions outlined in the following sections of the RFP prior to submitting a proposal.

- General Information and Instructions
- Mandatory Terms and Conditions per MGL Ch. 32, s.23B, as amended by Ch. 176 of the Acts of 2011.
- Required PERAC Disclosures – Vendor Certification, Compensation Paid, Compensation Received and Conflict of Interest, Placement Agent Statement
- Evaluation Criteria
- Minimum Criteria Certification
- Executive Summary and Investment Manager Questionnaire